

**DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT**

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**Date: September 12, 2011****Broadcast Bulletin: B 11-10**

To: Energy Program Contractors/Service Providers  
CSD Staff

Subject: Release of New and Revised CSD Forms

The purpose of this broadcast is to notify CSD Energy Providers regarding the release of several new and revised CSD forms. The table below contains these fields:

- Form name and number
- Whether the form is new or revised
  - If new, purpose of the form
  - If revised, purpose of revisions
- Date the form becomes effective
- Whether or not CSD will allow a Contractor's Equivalent for the form.

**Contractor Equivalent Forms**

Please recall that CSD temporarily suspended its Contractor Equivalent (CE) forms policy (EP 11-04) via an email sent out July 8, 2011. The suspension of this process until May 2012 means that you do not need to seek pre-approval from CSD in order to modify any of the forms listed below that allow CE.

However, please note that per the July 8 email, CSD will revisit all CE forms after May, 2012, and the changes that your agency may have made to any of the forms listed below may be disallowed at that time.

Also, if the chart below indicates that CE is not allowed, you must use the form as provided by CSD. Contractor Equivalents are not allowed on these forms at any time.

**Summary of New and Revised Forms**

Form Name and Number	New or Revised?	Effective Date	Purpose	CE Allowed?
Customer Assessment Summary (CSD 540B)	New	n/a	Agencies may choose to use this form to provide a summary of the home assessment (proposed services) to the owner of the residence, and to document owner repairs/responsibilities or refusal of certain measures.	No
Weatherization Deferral Form	Revised	10/1/2011	Previously part of WIS appendix. Updated	No

(CSD 542)			to include form number and allow agencies to download apart from WIS.	
REM Energy Audit Entry Form (CSD 544)	New	10/1/2011	This form was originally included in the "Single-Family/Small Multi-Family Energy Audit Protocol," but the form was never released as a numbered CSD form. This version of the form supersedes all previous versions used in documents or trainings.	No
Contractor Post Wx Inspection Report (CSD 611)	Revised	10/1/2011	Updated to remove page 2 (Contractor Checklist) and to add additional measure.	No
CAS Inspection Form (CSD 700) <i>Long Form</i>	Revised	10/1/2011	Updated to correct omissions and add additional options in some fields.	No
CAS Inspection Form Additional Space Heater (CSD 700A) <i>Long Form</i>	Revised	10/1/2011	Same as above.	No
CAS Interim CAS Tests (CSD 700B) <i>Long Form</i>	Revised	10/1/2011	Same as above.	No
CAS Inspection Form Post Repair/Replacement Safety Checks (CSD 700C) <i>Long Form</i>	Revised	10/1/2011	Same as above.	No
CAS Instruction Form Instructional Supplement (CSD 700IS) <i>Long Form</i>	Revised	10/1/2011	Updated to include changes resulting from revised CASIF forms.	n/a
CASIF Short Form (CSD 702)	New	10/1/2011	None of the "short forms" include detailed instructions or resource references. Short forms may only be used by experienced technicians, per instructions in the CSD 702IS.	No
CASIF Short Form -- Additional Appliances (CSD 702A)	New	10/1/2011	Same as above.	No
CASIF Short Form -- Interim CAS Tests (CSD 702B)	New	10/1/2011	Same as above.	No
CASIF Short Form -- Post Repair/Replacement Safety Checks (CSD 702C)	New	10/1/2011	Same as above.	No
CASIF Short Form -- Instruction/Authorization for Short Forms (CSD 702IS)	New	10/1/2011	Instructions and authorization for using CASIF short forms.	n/a
Blower Door Data Sheet (CSD 704)	Revised	10/1/2011	The form was corrected to add additional fields and revised to address new Economic Stop Parameters.	No
Duct Test Data Sheet (CSD 706)	Revised	10/1/2011	Updated to add "Can't Reach Pressure (CRP) precaution.	No
LSW -- RRP Compliance Report (Summary) (CSD 708)	New	10/1/2011	A tool to assist with record keeping and tracking requirements contained in the EPA's Lead Safe Wx Renovation, Repair Painting (RRP) rule, which requires that RRP work be performed by Certified Firms using Certified Renovators.	Yes
Lead Safe Wx (LSW) Renovation, Repair Painting (RRP) Rule Compliance	New	10/1/2011	To track all Lead-safe and RRP Compliance reporting.	Yes

Report Tracking (CSD 708B)				
Instructions and Table of Contents for LSW RRP Rule Compliance Report (CSD 708IS)	New	10/1/2011	Instructions and Table of Contents for using Lead Safe Weatherization Compliance Report (CSD 708)	n/a

## Questions

Please direct questions to Technical Assistance at [www.calstatewap.com](http://www.calstatewap.com).